

(12) INTERNATIONAL APPLICATION PUBLISHED UNDER THE PATENT COOPERATION TREATY (PCT)

(19) World Intellectual Property Organization  
International Bureau



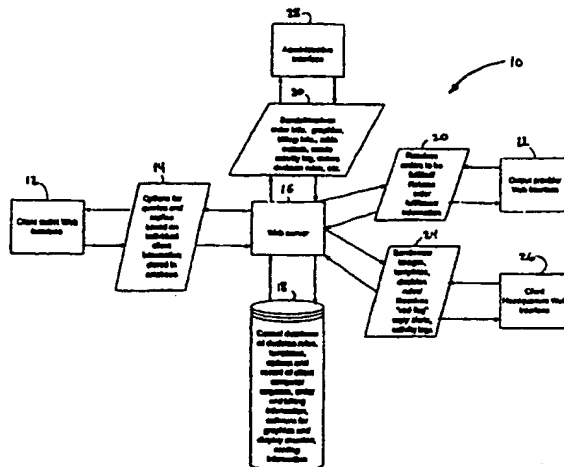
(43) International Publication Date  
1 February 2001 (01.02.2001)

PCT

(10) International Publication Number  
**WO 01/08052 A1**

- (51) International Patent Classification<sup>7</sup>: G06F 17/30 (74) Agents: WINTER, Gene, S. et al.; St. Onge Steward Johnston & Reens LLC, 986 Bedford Street, Stamford, CT 06905-5619 (US).
- (21) International Application Number: PCT/US00/20258
- (22) International Filing Date: 26 July 2000 (26.07.2000)
- (25) Filing Language: English
- (26) Publication Language: English
- (30) Priority Data:  
60/145,684 26 July 1999 (26.07.1999) US
- (71) Applicant (for all designated States except US): ON-LINE DESIGN, LTD. [US/US]; 555 Theodore Fremd Avenue, Rye, NY 10588 (US).
- (81) Designated States (national): AE, AL, AM, AT, AU, AZ, BA, BB, BG, BR, BY, CA, CH, CN, CR, CU, CZ, DE, DK, DM, EE, ES, FI, GB, GD, GE, GH, GM, HR, HU, ID, IL, IN, IS, JP, KE, KG, KP, KR, KZ, LC, LK, LR, LS, LT, LU, LV, MA, MD, MG, MK, MN, MW, MX, NO, NZ, PL, PT, RO, RU, SD, SE, SG, SI, SK, SL, TJ, TM, TR, TT, TZ, UA, UG, US, UZ, VN, YU, ZA, ZW.
- (84) Designated States (regional): ARIPO patent (GH, GM, KE, LS, MW, MZ, SD, SL, SZ, TZ, UG, ZW), Eurasian patent (AM, AZ, BY, KG, KZ, MD, RU, TJ, TM), European patent (AT, BE, CH, CY, DE, DK, ES, FI, FR, GB, GR, IE, IT, LU, MC, NL, PT, SE), OAPI patent (BF, BJ, CF, CG, CI, CM, GA, GN, GW, ML, MR, NE, SN, TD, TG).
- Published:  
— With international search report.
- For two-letter codes and other abbreviations, refer to the "Guidance Notes on Codes and Abbreviations" appearing at the beginning of each regular issue of the PCT Gazette.
- (72) Inventors; and  
(75) Inventors/Applicants (for US only): RIZZARO, Anthony, L. [US/US]; 177 Union Avenue, Harrison, NY 10328 (US). ELLIS, Mark, Richard [US/US]; 180 Brady Road, Warwick, NY 10990 (US).

(54) Title: SYSTEM FOR AUTOMATICALLY CREATING AND APPROVING POINT-OF-PURCHASE MATERIALS



(57) Abstract: A system for creating, approving, and producing promotional materials comprising a server (16), a database (18), accessible by the server (16), containing a plurality of decision rules (30) for promotional materials, a client outlet device (12) including a communication link with the server (16), an output provider device (22) including a communication link with the server (16), and a customized design for promotional materials submitted from the client output device (12) to the server (16) over the communication link. Software executing on the server receives the customized design from the client output device (12), retrieves the plurality of decision rules for promotional materials from the database (18), reviews the customized design against the decision rules, approves the customized design when comporting to the decision rules, and transmits the approved customized design to the output provider device (22) over the communication link for processing and fulfillment.

WO 01/08052 A1

**SYSTEM FOR AUTOMATICALLY CREATING AND APPROVING  
POINT-OF-PURCHASE MATERIALS**

**Prior Application**

This application claims the benefit of U.S. Provisional Patent  
5 Application Serial No. 60/145,684 filed July 26, 1999.

**Field Of The Invention**

The invention relates to an automated system for the creation, approval  
and printing of promotional or display materials by a local outlet connected to  
a central organization

10

**Background Of The Invention**

Distributed representatives of corporations, including sales people,  
franchisees and other types of local outlets, regularly have a need for display  
and promotional materials that incorporate, among other things, national or  
international branding strategies, advertising and promotional campaigns, and  
15 legal disclaimers. To date, these distributed representatives have relied on  
local workarounds or a national program for their promotional materials. This  
material is, at worst, amateurish, inaccurate or unable to leverage the value of  
national branding strategies. At best, it is attractive but generic. As a result of  
this lack of customization, utilization levels for these generic materials at the  
20 local level can be low, and corporations waste the money they spend on  
producing these materials. There is also no single system that connects all  
the steps involved in the creation, approval and printing of promotional  
materials.

Today, no product or service exists in a form that allows for the  
25 creation of promotional materials in a manner that simultaneously meets the  
needs of local outlets and national headquarters. Even if no review is

- 2 -

performed at a national level, the process of creating signage requires multiple steps and is largely manual. Order fulfillment systems over the Internet are known. These systems provide the ability to design and request the printing of business cards and other similar materials. However, these are  
5 not marketing-driven systems. There is no focus on the needs of a specific client or overall strategy built in to the system that focuses the user on elements of a national marketing plan combined with specific needs of a local market. There is nothing to prevent the user of these fulfillment systems from creating items that are not in accordance with a corporate strategy. The  
10 currently available systems are not systems for automating the design and delivery of marketing materials, as prescribed by a centralized authority in accordance with a corporate marketing strategy.

Using the example of a poster, the typical current process for designing, approving, ordering, printing and delivering promotional materials  
15 might proceed as follows:

First, a creative agency or a representative from a local outlet (whether or not they are trained in graphic design) designs a poster. Or, the outlet may work with a local print shop that offers design services for this step. After the poster is designed, a representative from the local outlet must approve a draft  
20 version in person. If a review by a national representative is required, the poster design must then be sent to the correct individual(s) within the organization, and the outlet must wait for the decision or revisions to be returned.

After approval, the design must go to a printer for output. The file may  
25 or may not be sent electronically, and a billing account must be set up in advance. If no electronic access is offered, the design must be delivered in person. It is then printed, and must be approved in person. Alternatively, the outlet could approve the poster without seeing it and have it shipped directly, but in doing so mistakes may not be noticed and the printer will have to re-do

- 3 -

the work, for which the outlet may or may not be charged. Invoices from the printer and the creative agency may be separate, and most likely go to the local outlet, which must then send them to headquarters.

5        This example illustrates the fact that there is no "one-stop-shop" for a company to use for creating, approving and delivering promotional materials in a timely manner at the local level. No single tool provides the ability to create promotional materials that combine the need for local flexibility with the need for conformance with national standards. Even more important, no tool allows the outlet to put in motion from one request the creation, production  
10      and delivery process for display. Currently, this process demands multiple steps and many points of contact.

         Therefore, what is desired is a self-executing system for creating promotional materials that simultaneously combines the benefits of access to central corporate marketing resources and access to content that is  
15      customized at the local level. An automated mechanism by which a corporate headquarters can ensure that its parameters, controls, and marketing campaigns are supported at the local level and that rules pertaining to the use and content of promotional materials are adhered to by all outlets is also desired. A system that prevents waste of marketing materials, provides  
20      speedy approval of material designs, and facilitates the billing process is further desired.

#### Summary Of The Invention

         Accordingly, it is an object of the invention to provide a system and method for use by corporations and their distributed representatives to create,  
25      approve and produce promotional materials in a faster, more efficient and more effective manner.

         Another object of the invention is to provide a system and method of

- 4 -

the above character which automatically subjects customized information to be included in promotional materials to review process filter consisting of a set of decision rules that screen out inappropriate information.

5           A further object of the invention is to customize the decision rule filter to each application of the invention, and allow for the decision rules to be changed or updated at any time, via an Internet-based or other interface.

A further object of the invention is to provide automatic notification to the headquarters when an outlet wishes to create a sign with copy that is not accepted by the pre-determined set of decision rules.

10           A further object of this invention is to provide an Internet-based interface for allowing the distributed outlets of a company to communicate with both headquarters and the output provider, and to receive automatic updates from an administrative interface.

15           A further object of the invention is to automatically alert output providers or other constituents that an order has been placed.

A further object of the invention is to provide a bar code-based tracking system right on the display material itself that allows the printer, the outlet and the headquarters to track the status of any order.

20           A further object of the invention is to provide an Internet-based interface for creating customized promotional materials on demand in such a way that each outlet sees only those options that are available to it at a given time. It is also an object of the invention to allow the outlet to incorporate individualized images and copy in the promotional materials that are different from all other outlets' images and copy.

25           A further object of the invention is to provide an Internet-based

- 5 -

interface for creating customized displays that provides distributed outlets with design options drawn from a maintained database of both national and locally-contributed images and copy.

These and other objects of the invention are achieved by providing a  
5 device that automatically creates and approves promotional materials and routes them to an output provider. The device includes a server, a database containing decision rules, stored images and information about options available to each specific outlet, and the software required to transmit the completed design with low and sometimes high-resolution images to the  
10 output provider. The device also includes software executing on the client for automatically alerting the output provider to the order. The device also includes software for incorporating identifying information, such as a bar code, into the promotional materials themselves and tracking the status of the order as it moves through the process to the output provider and finally is shipped to  
15 the outlet. In terms of hardware, the invention can be Internet- or intranet-based, depending upon the client's needs, and if a private network is already in place at distributed outlets.

The invention and its particular features and advantages will become more apparent from the following detailed description considered with  
20 reference to the accompanying drawings.

#### Brief Description Of The Drawings

Fig. 1 is a block diagram of a system for automatically creating and approving promotional materials, including signs and promotional materials in accordance with the invention.

25 Fig. 2 is a block diagram of one specific embodiment of the system and method for automatically creating and approving promotional materials, including signs and promotional materials.

- 6 -

Fig. 3 is a block diagram of another embodiment of the system and method for automatically creating and approving promotional materials, including signs and promotional materials.

Fig. 4 is a block diagram of another embodiment of the system and method for automatically creating and approving promotional materials, including signs and promotional materials.

Fig. 5 is a block diagram of an embodiment of the process of transmitting graphics files within the system.

#### Detailed Description Of The Drawings

Fig. 1 depicts a system 10 for automatically creating and approving promotional materials, such as signs and display materials. The system 10 consists of an Internet-based interface accessed via a client computer 12 that queries 14 a server 16 that is connected to a central database 18 containing a plurality of information about specific clients as well as the central headquarters and the output providers. The server 16 communicates information 24 to the client headquarters 26 via a Web-based connection, which the Client Headquarters accesses via a Web-based interface. The Web-based interface is accessed via a URL, which is different for the client-level interface, the output provider-level interface, the central headquarters interface, and the administrative interface 28. The administrative interface 28 acts as a clearing house for information, including billing, activity logs, entry of new graphics and decision rules, among other activities, many of which will be determined specifically by the client's needs. The output provider interface 22 is the point of access to the system 10 for the output provider who prints the promotional materials created by the outlet and approved by the client headquarters. The output provider sends and receives information 20 about the status of orders as well as the files themselves.

- 7 -

The process by which an order for promotional materials is created, approved and fulfilled is set in motion by a request from the client interface. The output provider interface is focused on the receipt of digital files that will be used to print the specific order, including the bar code that includes the  
5 necessary tracking and shipping information. The administrative interface 28 is the point of access for system administrator, who uses it to send and receive order information, assign barcodes to orders (done automatically), enter decision rules to the system for clients, keep a record of individualized billing information, enter new graphics into the system, track order  
10 information, and other activities 30.

A concrete example of how this system would work is as follows, using a reference to an auto manufacturer and its dealers for illustrative purposes:

First, an auto manufacturer would have a number of marketing campaigns in place, which change during the year. It would also have rules  
15 for the use of its logos and for the inclusion of specific language whenever pricing is discussed in promotional materials. All this information and the appropriate options for promotional materials (e.g., posters, banners, etc.) would be combined with decision rules in the central database of the invention. The user would also include images and logos pertinent to its  
20 market in that database, and these will have been approved by the client headquarters. When the dealer goes to make a poster, he will sit at a terminal and access a Web page that walks him through the steps of creating that poster, on which he can include his own dealership logo and national logos and images from headquarters, as well as language about a new  
25 promotion for leasing. If he should type in the name of a competing auto manufacturer, for example, the system will not allow him to complete the order. He will have to revise the copy he includes until it passes through the decision rule filter and he is allowed to continue with the ordering process.



- 8 -

When the dealer has completed the order for the poster, it is automatically sent to an output provider. When the order arrives at the output provider, it has a bar code included on the display material that gives the output provider shipping instructions. Billing is handled by the administrative interface, which has been given specific instructions by the client regarding how the billing is to be done. The dealer then receives the printed poster and puts it up in the showroom.

Fig. 2 depicts the user's view of the process by which promotional materials are designed, ordered, sent for fulfillment and received. The process is set in motion when the user at the outlet logs in 32 by submitting authentication information to the server 16, such as a pre-determined name and password. The user login and password and login may then be associated by the system 10 to user-specific information, such as various shipping and billing information, inputted previously by the user, such as by a registration process. Once the authentication information is verified, a welcome screen 34 is presented that identifies the user and presents the specific program options available to that outlet at that time. The user selects a program option from this menu 36. The user is then shown a list of available display material types for the chosen option 38 and the user selects one of these options 40. The user is then shown a screen that offers specific layout and customizing options on a step-by-step basis for the display material and program chosen 42. At each step 44, the user is able to select from custom options that will be in three categories: fully custom 46 which means the user is creating much of the content; semi-custom 48 which means the user is creating only some of the content to be used in the promotional materials; or pre-approved standard 50 which means the user is selecting from pre-defined options that have already gone through the approval process, or were designed by the central headquarters and are being used in an un-altered format.

- 9 -

Any custom options 46,48 selected by the user are sent to the central database for review against the decision rules 52. These rules act as an automatic editor, raising "red flags" on any copy or images that are not considered usable in promotional materials by the client headquarters. They may act as a word filter or require the inclusion of legal copy if a specific word or phrase is used in the display material. They may also require the positioning of logos on a sign, or sizing of images. Additionally, the decision rules could include a comprehensive database of local regulations regarding promotions and advertising. This would be especially useful in the field of the sale of alcohol, which is subject to a wide array of regulations that vary dramatically between states. The system could determine the appropriate regulations to use as decision rules by determining the location of the outlet based on previously submitted information or submission of location information by the user. The decision rules are developed to work within the system based on the client's specific needs.

The options selected are reviewed against the decision rules and are either approved or rejected 54. Rejected options 56 are sent back to the user for revision by way of a screen that identifies the copy or graphics that did not pass the decision rules filter process 60. The user makes revisions to the copy on that screen and re-submits the custom selection for review by the decision rule filter, essentially repeating steps 52 through 54 until the selection is approved. This comparison against the decision rule is performed for every screen on which the user can create custom information in any form to be included in the promotional materials. If the custom options are approved 58 or are part of the pre-approved standard group 50, and after all necessary selections have been made and approved, the user is shown a draft of the completed custom design 62.

The user must then either approve 64 or reject 66 the draft. If the draft is rejected, the user is sent back to the available display types screen 68 to select a new display item and begin the customization process again. Or, the

- 10 -

user can opt to return to the point at which any unacceptable design customization selection was made. If the draft is approved and the user wished to make more promotional materials, he is returned to the main menu 70. If the draft is approved and the user wished to end the session 64 the user  
5 proceeds to the checkout screen 72 where he is shown the full contents of his order and the terms of the order, such as when it must be used. The user then approves or rejects this order and its terms 74. If the order is rejected 76 the user is asked to either return to the main menu or to log off the system 80.

If the user approves the order and terms 78, he is shown a thank-you  
10 screen 82 with the order confirmation number and telephone and e-mail support contact information. The user is then given the opportunity to print out a confirmation 84 and asked to log off the system 86 to ensure that unauthorized users do not gain access accidentally through an unattended machine. After the user confirms the order, a message is automatically  
15 generated by software triggered by the user interface that sends the user's order information to the central server 88. The server 16 then automatically generates an order for the output provider, and order updates for the administrator interface and the client headquarters interface 90. The user also receives an electronic confirmation that the order has been placed 92. A  
20 telephone number and electronic contact link is also provided in case the user needs to consult with the client headquarters about the billing procedure or terms of use. Finally, the user receives the completed order from the output provider 94.

Figure 3 depicts the process by which the system server moves the  
25 creation and fulfillment of orders. First, the user is authenticated, i.e. the user logs in 96 and the name and password are sent to the server for approval 98. If the log in is accepted, the server then queries the database 100 for information about the display options available to the specific outlet that has just logged in to the system. A "welcome" screen with the results of that query  
30 are returned to the user 102. The user then selects from the options shown

- 11 -

104 and that selection is returned to the server 106. The server then queries the database for more information about the option selected 108 and the user is shown the results of that query 110 including information about the specific promotional materials available. The user then selects the type of  
5 promotional materials he wishes to order 112 and that choice is returned to the server 114 and the server queries the database to retrieve the custom options available to the user.

The retrieved options, along with a finished display option, are shown to the user 116 and the user selects from the levels of customization available  
10 118. The options are pre-approved standard 124 which is a completed display designed by the client headquarters; semi-custom 120 which is a nearly-complete poster to which the user will add minimal custom copy; or fully custom 122 to which the user will add all or nearly all elements on a customized basis. If either semi- or fully custom is selected, the options are  
15 reviewed against the decision rules as they are added 126, meaning that the user is given the option to add several custom items, and after each one is entered, it is reviewed. If the pre-approved standard is chosen, it is automatically approved by the system 130. If the system 10 rejects a custom element 128, the part that has been rejected is shown to the user, and the  
20 user is asked to revise it 132 and re-submit it for approval, essentially repeating the steps until the completed sign is approved. Also at this stage, the decision rules will make required adjustments to the copy or custom elements. For example, if a car dealer uses the word "lease," required legal copy is automatically added to the display material. Or, if the name of the  
25 parent company is used, it is automatically replaced with a logo or a trademark symbol is added. After all options have been entered, reviewed and approved by the decision rule filter 130, the completed design is shown to the user 134.

At this point, the user has the option to accept or reject this design. If  
30 the user rejects the design 136, the user has the option to change the sign

- 12 -

and re-submit the changes to the decision rule filter 126, or return to the main menu to start over 142. Or, the user can opt to cancel his order and log off the system 148 at any time. If the user approves the design and wants to keep shopping, the user's design is entered into a "shopping cart" 150 and the user is returned to the main menu 144. If the user approves the design and wishes to complete his order 140, that request is sent to the server 146, and the server returns a shopping cart screen 152 with the details and terms of the order. The user can then accept or reject the order and terms. If the order is rejected 154, that selection is sent to the server 158 and the server 10 returns a cancel order screen 162 and the user is given the option to log off the system or return to the main menu 168. If the user returns to the main menu 170 the process begins again. If the users logs off the system 172 the server 10 returns a log off screen to ensure that unauthorized users do not gain access to the system 176.

15           If the order is accepted 156, that selection is sent to the server 160 and the server 10 returns a screen that shows everything the user has ordered along with an order number, a contact telephone and e-mail for customer service and any other required information 164. The user is also given the option to print out this screen at this point. Then, the user is asked to log off the system 172 and shown the log off screen 176. The server 10 then attaches a high-resolution graphic file and bar code to the display design, for use by the output provider 166 and sends the order to the output provider 174. An update is also sent to the client headquarters and the administrative interface that an order has been sent 174. An electronic confirmation is also sent to the user to automatically confirm that an order has been placed 178. After the order has been filled, the output provider sends notification to the system administrator automatically, at the same time as the display material is sent to the user.

Figure 4 depicts the process by which a designated output provider will receive a file from the system, print it and send it to the user who ordered the

- 13 -

promotional materials. First, an electronic notification of with the order is sent to the output provider by the system server 180. Next, the output provider reads the electronic notification and a receipt is automatically generated and sent to the system server 182. The output provider next downloads high-  
5 resolution images associated with the order in print-ready format from the server 184. The output provider then prints the file 186. A label is then generated by a barcode on the display material 188. The display is shipped according to the order instructions using the label generated in the previous step 190. An update is sent to the server 16 that the order has been shipped  
10 192. When the output provider sends an update to the server, the server sends an update that the order has been shipped to the administrative interface, the client headquarters and the outlet that ordered it 194. The server 16 also uses this confirmation to keep track of all orders placed and fulfilled for administrative purposes. Finally, the outlet that ordered it 196  
15 receives the order.

Figure 5 depicts an embodiment of the process for transferring and managing graphics files. Since graphics files can be extremely large, they often have the effect of slowing down a system while the system 10 tries to process or manipulate the file. This is especially true in the instance where  
20 such files are being transmitted between computers, such as over the Internet. The user creates their custom promotion using graphics files retrieved 198 from the database 18 and transmitted 200 to the client outlet 12 by the server 16. Alternatively, such graphics could be resident on the client outlet device. Each of the images and text used in building the promotion are  
25 integral to the system 10 and have an attached unique identifying tag that corresponds to a related high resolution graphics file. Once the customized design is completed and approved, the customized design including the unique identifying tags and creation instructions in code and/or data are transmitted 202 to the server 16. Additionally, all elements of the customized  
30 design are stored for tracking and reporting. At this point, depending on the location of the printing facilities, the server may directly process and print the

- 14 -

customized design using the high resolution graphics corresponding to the identifying tags submitted with the design or the server may transmit 204 the customized design including identifying tags to the output provider. In the instance where the output provider is utilized, the output provider would  
5 retrieve 206 or 205 the high resolution graphics corresponding to the identifying tags and print 208 the customized design using the retrieved high resolution graphics.

The administrative function of the system 10 maybe readily expanded to facilitate the management of cooperative advertising funds and accounts by  
10 tracking and storing various aspects of the creation and printing process. The number of instances where a graphic related to a specified brand is incorporated into customized designs is readily determined by tracking and storing the contents of each customized design. The number of instances where customized designs are successfully fulfilled and delivered is easily  
15 determined by tracking and storing order confirmations from the output provider. Finally, by tracking and storing the amounts paid for fulfilled customized designs and including the necessary performance requirements for eligibility for co-op fund in the database, the system can quickly determine whether various performance requirements have been achieved based on the  
20 tracked data. Using the tracked data, the administrator could quickly provide a detailed report specifying any desired information that can be collected related to the creation and production of the promotional materials to a client headquarters for research or reporting purposes.

Additionally, the system 10 readily permits the user to manage  
25 promotions and accounts. By tracking and storing the activities of the user within the system, a wide variety of information and uses of such information can be made available to the user by the system 10. Such a management function in the system 10 would permit a user, particularly a manager, to check accounts of various locations, track the status of an ongoing project,  
30 monitor the number of times a particular brand logo, product name, or brand

- 15 -

name is used in a promotion, to list a few examples. Additionally, the user may research the effectiveness of different advertisements and campaigns by reviewing the rate of usage. The management function could be expanded to include financial controls, such as spending level cutoffs by account, by salesperson, by region, by type of account, by event, or by fixed time period. Such financial controls could be passively enforced by providing notification to a user who has exceeded a limit, or the controls may be actively enforced by refusing to complete any order for promotional materials that would cause a user to exceed a certain limit. As above, the tracked and stored information can be easily retrieved and compiled to create reports.

It is to be understood that while the above description generally refers to specific types of interfaces with the server, any suitable method of interfacing with the server that permits operation of the system may be used. For example, interface with the system may be any of the following manners via wired or wireless methods, or any combination thereof. The user may access a website or network with a web browser or network application with their own device containing the browser or application. In this instance all decisions and selections regarding the appearance and content of the promotional material are made on the website or network server. When complete, the promotion is transmitted along with the user-specific information, order specifics, and creation instructions to the server or printer. Alternatively, the user may download the necessary component of their custom promotion onto their own device and design the promotion within the user's own copy of the system interface. The user may also operate within the interface while off-line, i.e. not connected to the system, and merely re-establish the connection prior to submission of the design. It is to be also understood that any device may be used by the user to interface with the system, for example a lap top computer, personal digital assistant, network terminal, or desktop computer.



- 16 -

Although the invention has been described with reference to a particular arrangement of parts, features, and the like, these are not intended to exhaust all possible arrangements or features, and indeed many other modifications and variations will be ascertainable to those of skill in the art.

- 17 -

What is claimed is:

1. A system for creating, approving, and producing promotional materials comprising:
  - a server;
  - a database, accessible by said server, containing a plurality of decision
  - 5 rules for promotional materials;
  - a client outlet device including a communications link with said server;
  - an output provider device including a communications link with said server;
  - a customized design for promotional materials submitted from said
  - 10 client outlet device to said server over said communications link; and,
  - software executing on said server for receiving said customized design from said client outlet device, retrieving said plurality of decision rules for promotional materials from said database, reviewing said customized design against said decision rules, approving said customized design when
  - 15 comporting to said decision rules, and transmitting the approved customized design to said output provider device over said communications link for processing and fulfillment.
2. The system of claim 1 wherein said database further contains a plurality of graphics and templates for promotional materials and the system further comprising:
  - software executing on said server for retrieving said plurality of
  - 5 graphics and templates from said database and transmitting said retrieved plurality of graphics and templates to said client outlet device over said communications link; and,
  - software executing on said client outlet device for receiving said
  - plurality of graphics and templates, presenting said plurality of graphics and
  - 10 templates to a client outlet, receiving a plurality of selections of graphics and templates from said client outlet, and assembling said customized design based on said plurality of selections.

- 18 -

3. The system of claim 2 wherein said plurality of graphics and templates contained in said database are pre-selected by a client headquarters.
4. The system of claim 1 wherein said plurality of decision rules for promotional materials contained in said database are determined by a client headquarters.
5. The system of claim 1 further comprising software executing on said output provider device for receiving said customized design from said server, generating an order confirmation, and transmitting said order confirmation to said server.
6. The system of claim 1 further comprising software executing on said server for disapproving said customized design when not comporting to said decision rules, notifying said client outlet device over said communications link of non-comporting status of customized design and requesting  
5 modification of said customized design prior to approval and fulfillment.
7. The system of claim 1 further comprising:  
authentication information submitted by said client outlet through said client outlet device to said server over said communications link; and,  
software executing on said server for receiving said authentication  
5 information from said client outlet device, querying said database to verify said authentication information, and permitting access to the system when said authentication information is verified.
8. The system of claim 7 further comprising software executing on said server for determining options available to said client outlet for customizing promotional materials based on said authentication information and transmitting said available options to said client outlet computer over said  
5 communications link.

- 19 -

9. The system of claim 8 wherein said database further includes information regarding the location of said client outlet and said decision rules include local regulations regarding promotional materials and the system further comprising software executing on said computer for relating said authentication information with said client outlet, retrieving location information from said database related with said client outlet, retrieving local regulations corresponding to said retrieved location information, determining compliance of said customized design with said retrieved local regulations prior to approval and fulfillment.
10. The system of claim 1 wherein said communications link comprises an appropriate Internet connection.
11. A system for creating and approving promotional materials comprising:  
a server;  
a database, accessible by said server, containing a plurality of graphics and templates for promotional materials and decision rules for promotional materials;  
software executing on said server for maintaining a client outlet interface accessible by a client outlet via said communications link wherein said client outlet interface permits said client outlet to select from said plurality of graphics and templates to create a customized design for promotional materials; and,  
software executing on said server for receiving said customized design from said customer outlet interface, retrieving said plurality of decision for promotional materials, comparing said customized design against said decision rules, and determining the approval of said customized design based on the comparison.
12. The system of claim 11 further comprising software executing on said server for retrieving said plurality of graphics and templates for promotional

- 20 -

materials from said database and presenting said retrieved graphics and templates to said client outlet through said client outlet interface.

13. The system of Claim 11 further comprising software executing on said server for maintaining a client headquarters interface accessible by a client headquarters wherein said client outlet interface permits said client headquarters to submit said plurality of graphics and templates for  
5 promotional materials and decision rules for promotional materials to said server for storage and retrieval on said database.

14. A system for creating and producing promotional materials comprising:  
a server;  
a database, accessible by said server, containing a plurality of low-resolution graphics for promotional materials wherein each of said plurality of  
5 graphics includes a unique identifying tag that relates to a corresponding high-resolution graphic;

a client outlet device including a communications link with said server;  
a customized design for promotional materials submitted from said client outlet device to said server over said communications link;;  
10 software executing on said server for retrieving said plurality of graphics from said database and transmitting said retrieved plurality of graphics to said client outlet device over said communications link;  
software executing on said client outlet device for receiving said plurality of graphics and templates, presenting said plurality of graphics and  
15 templates to a client outlet for selection, receiving a plurality of selections from said client outlet, and facilitating assembly of said customized design by said client outlet based on said plurality of selections; and,  
software executing on said server for receiving said customized design  
from said client outlet device, retrieving a plurality of high-resolution graphics  
20 corresponding to identifying tags of each of said plurality of selections, and printing the customized design using said retrieved plurality of high-resolution graphics.

- 21 -

15. A method for creating and approving promotional materials comprising the steps of:

a client creating a customized design for promotional materials consisting of a plurality of elements;

5 the client electronically submitting said customized design to a server for approval;

the server receiving said customized design; and,

the server comparing said plurality of elements of said customized design against a plurality of decision rules for regulating specific elements of customization for promotional materials to determine approval.

16. The method of claim 15 further comprising the steps of:

the server electronically notifying the client of disapproval of said customized design material; and,

5 repeating said steps of creating, submitting, receiving and comparing said customized design until said customized design is approved

17. The method of claim 15 further comprising the steps of:

the server approving said customized design based on said comparison;

5 the server transmitting said customized design to an output provider; the output provider receiving and printing said customized design, and, the output provider delivering said customized design to said client outlet.

18. A method for tracking advertising expenditures and effectiveness for co-op purposes comprising the steps of:

electronically tracking and storing instances where a graphic related to a specified brand is being incorporated into customized designs,

5 electronically tracking and storing instances where said customized designs are successfully fulfilled and delivered;

- 22 -

electronically tracking and storing amounts paid for said fulfilled  
customized designs;

- 10        monitoring performance requirements for eligibility for co-op fund, and,  
         electronically determining whether said performance requirements  
         have been achieved based on the tracked data.

Fig. 1

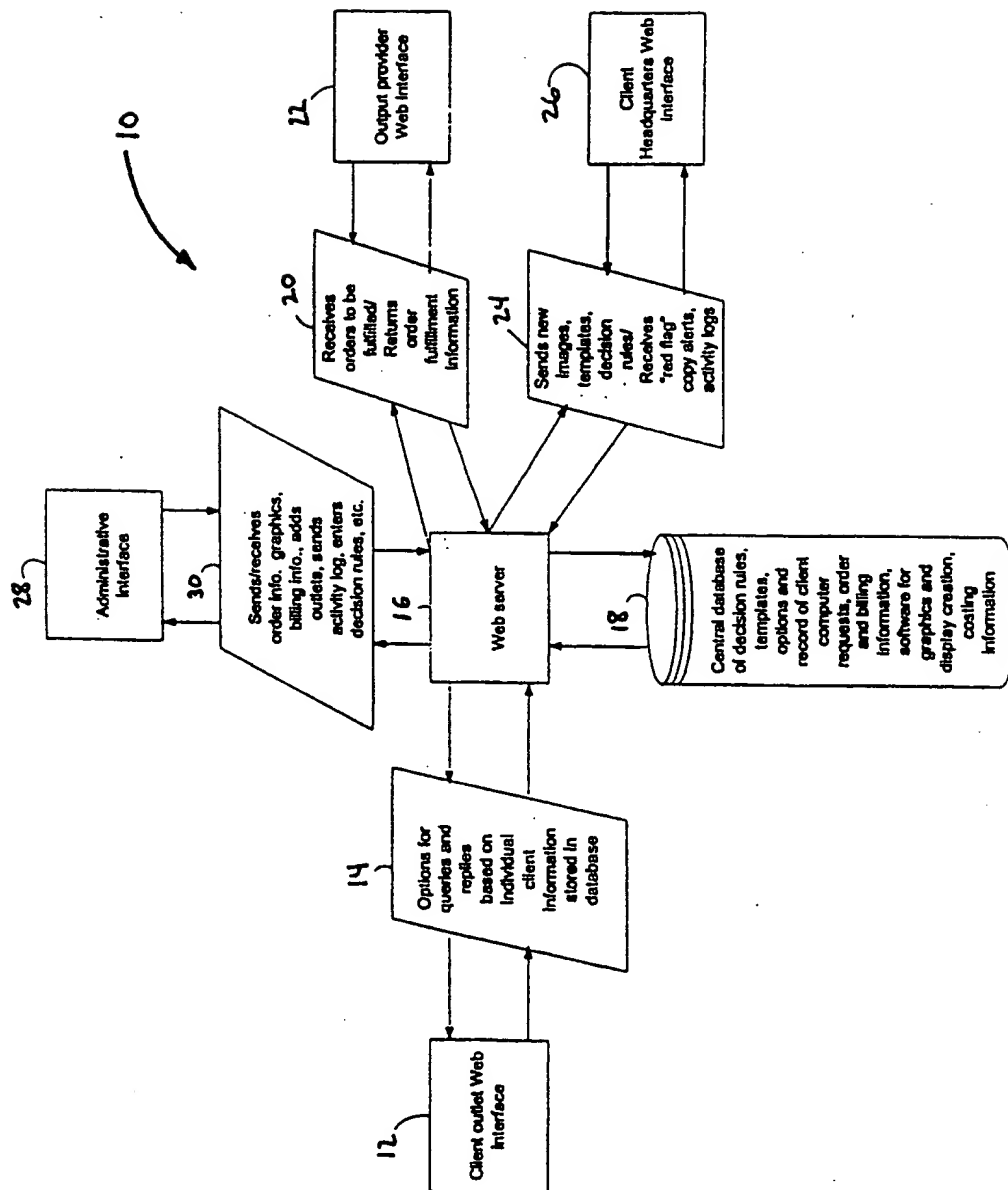
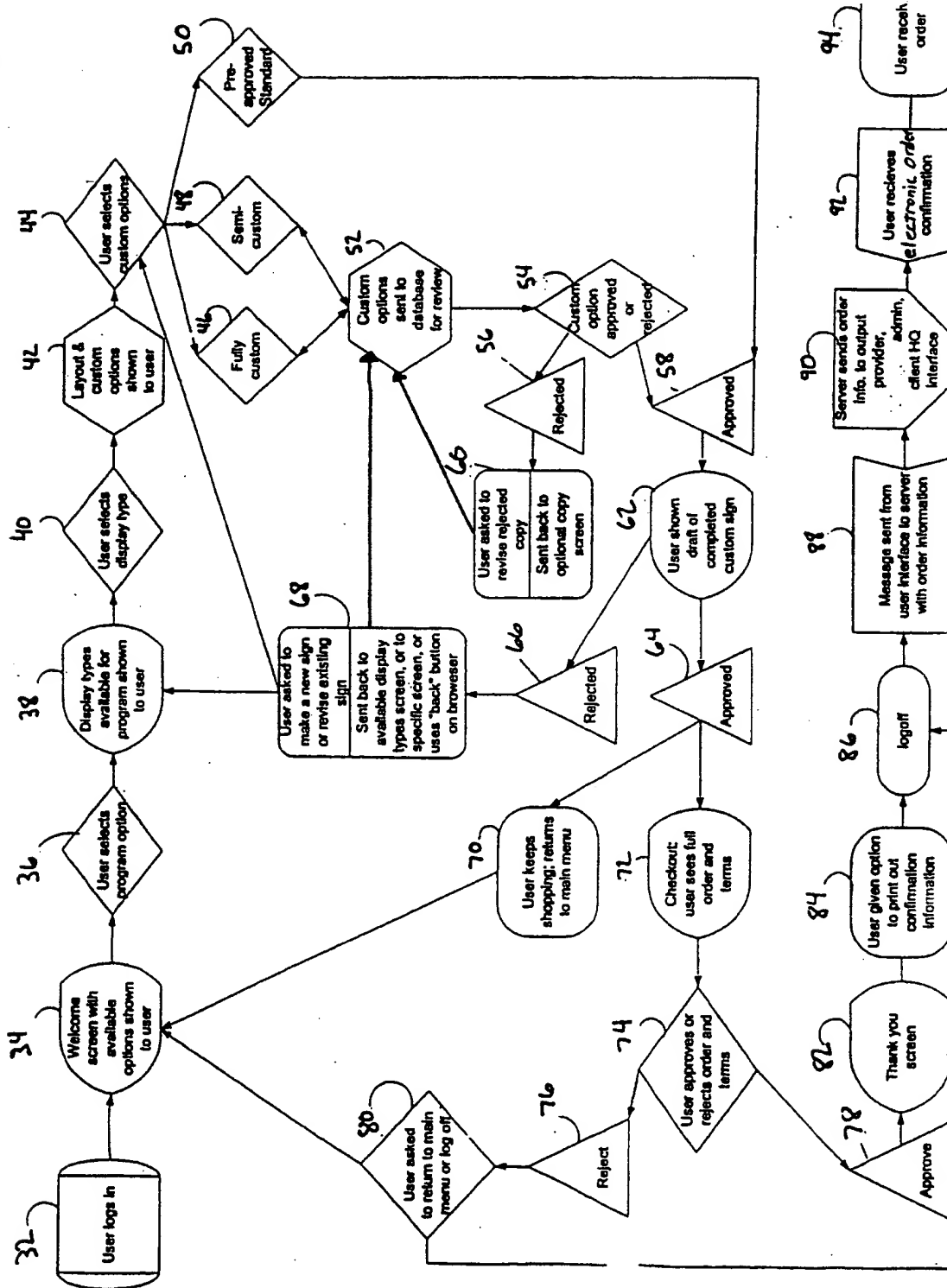




Fig. 2



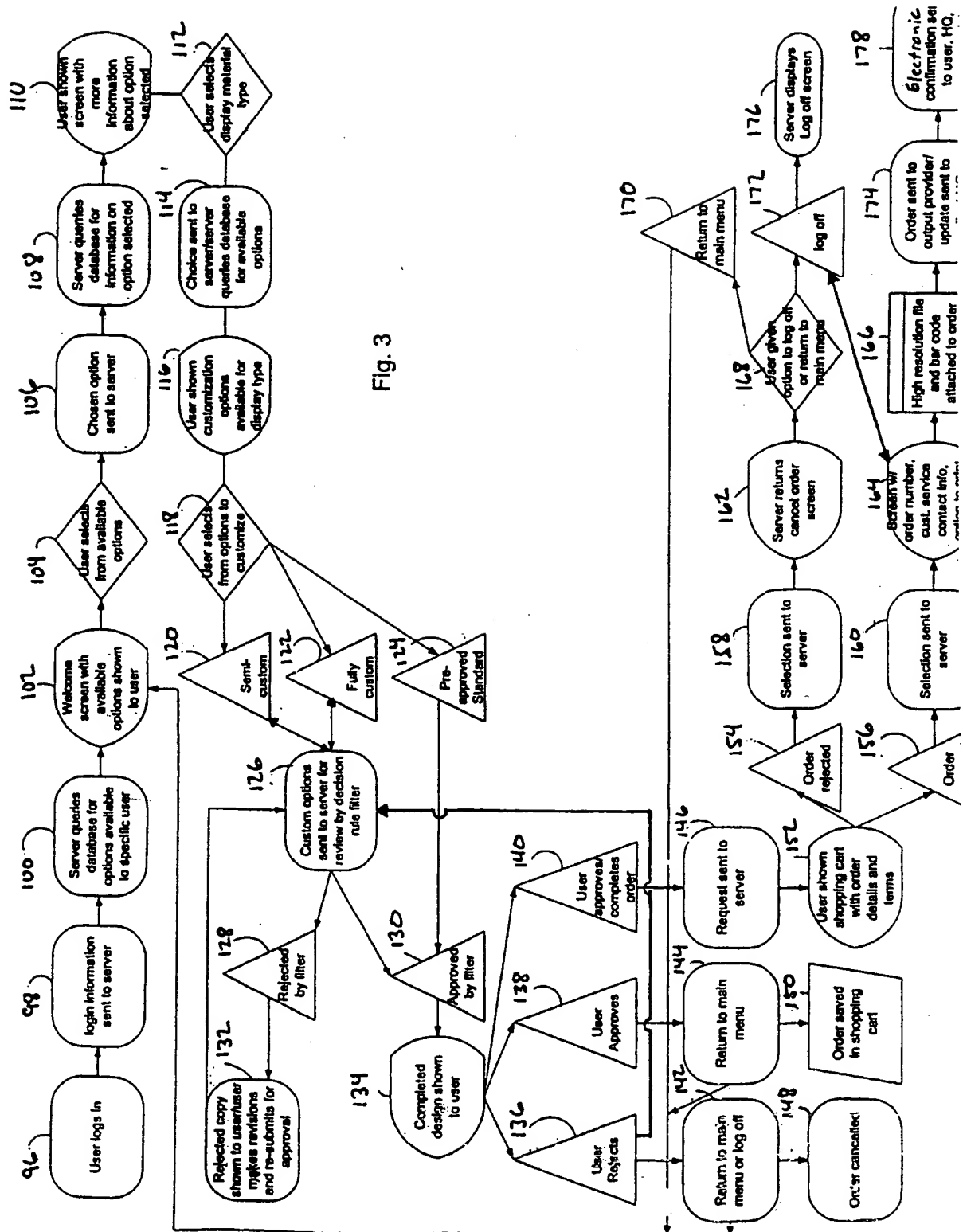


Fig. 4

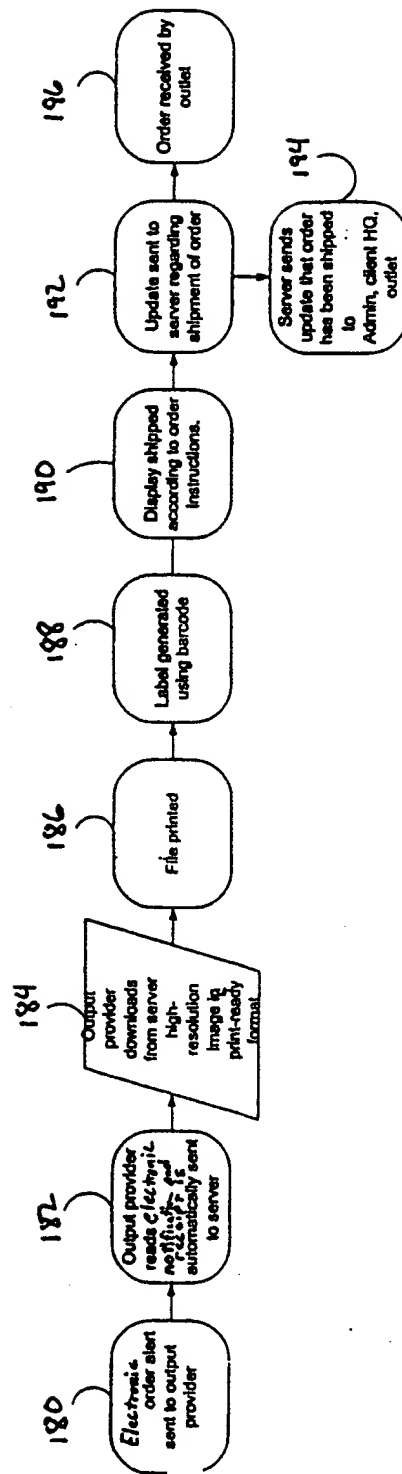
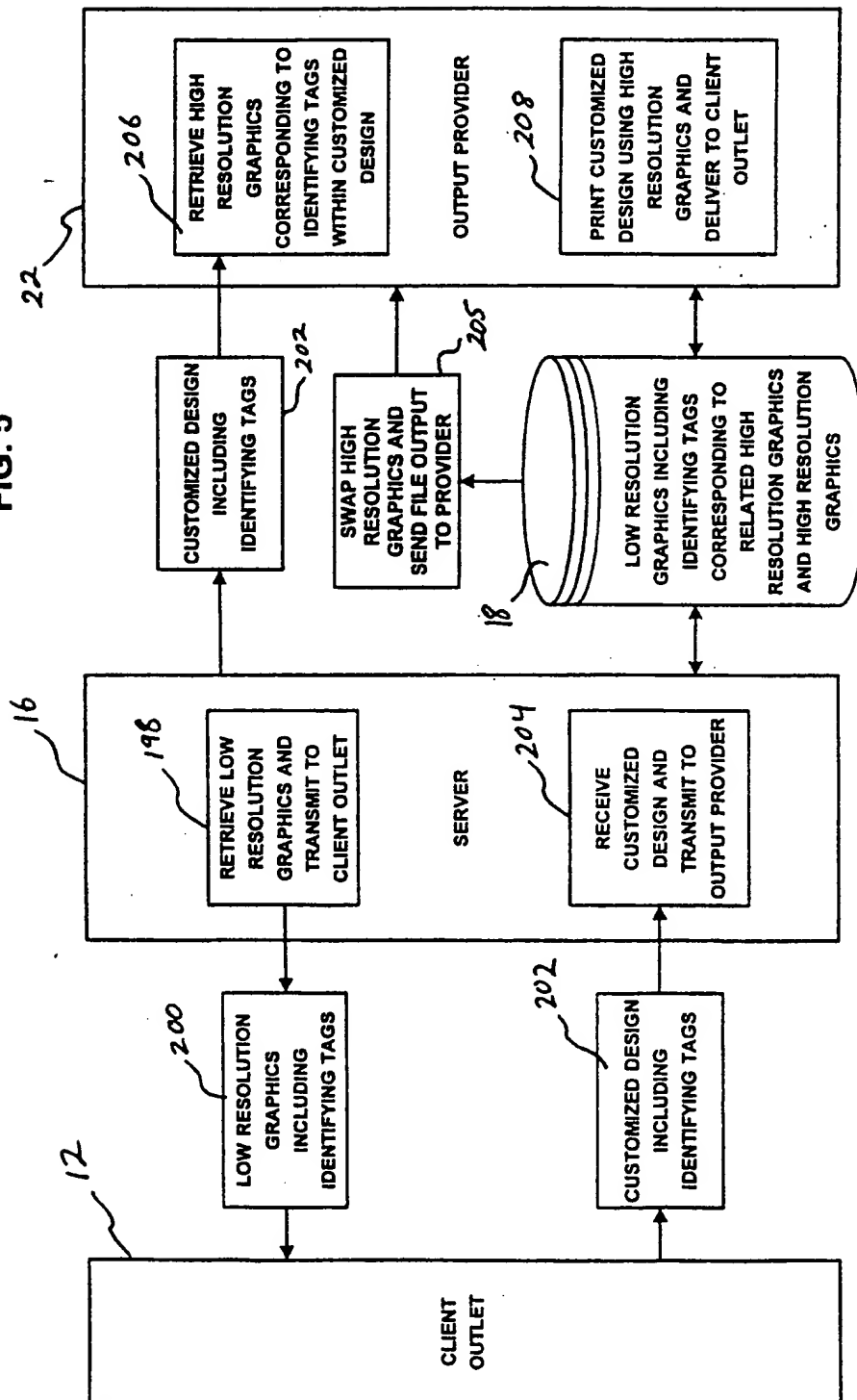


FIG. 5



## INTERNATIONAL SEARCH REPORT

International application No.  
PCT/US00/20258

## A. CLASSIFICATION OF SUBJECT MATTER

IPC(7) : G06F 17/30

US CL : 705/10, 14

According to International Patent Classification (IPC) or to both national classification and IPC

## B. FIELDS SEARCHED

Minimum documentation searched (classification system followed by classification symbols)

U.S. : 705/10, 14

Documentation searched other than minimum documentation to the extent that such documents are included in the fields searched

Electronic data base consulted during the international search (name of data base and, where practicable, search terms used)

WEST 2.0. CAS ONLINE. DIALOG. IEEE

## C. DOCUMENTS CONSIDERED TO BE RELEVANT

Category*	Citation of document, with indication, where appropriate, of the relevant passages	Relevant to claim No.
A	US 5,740,425 A (POVILUS) 14 April 1998, see entire document.	1-18
A	US 5,778,049 A (YOUNG et al) 07 July 1998, see entire document.	1-18

☐ Further documents are listed in the continuation of Box C. ☐ See patent family annex.

* Special categories of cited documents:	*T* later document published after the international filing date or priority date and not in conflict with the application but cited to understand the principle or theory underlying the invention
*A* document defining the general state of the art which is not considered to be of particular relevance	*X* document of particular relevance; the claimed invention cannot be considered novel or cannot be considered to involve an inventive step when the document is taken alone
*E* earlier document published on or after the international filing date	*Y* document of particular relevance; the claimed invention cannot be considered to involve an inventive step when the document is combined with one or more other such documents, such combination being obvious to a person skilled in the art
*L* document which may throw doubts on priority claim(s) or which is cited to establish the publication date of another citation or other special reason (as specified)	*Z* document member of the same patent family
*O* document referring to an oral disclosure, use, exhibition or other means	
*P* document published prior to the international filing date but later than the priority date claimed	

Date of the actual completion of the international search 01 OCTOBER 2000	Date of mailing of the international search report 17 NOV 2000
Name and mailing address of the ISA/US Commissioner of Patents and Trademarks Box PCT Washington, D.C. 20231 Facsimile No. (703) 305-3230	Authorized officer <i>Pagett Hancock</i> TOD SWANN Telephone No. (703) 308-7791

**THIS PAGE BLANK (USPTO)**